

Approval Manager for Dynamics 365 for Project Service Automation

User Guide



Approval Manager

for Dynamics 365
Project Service Automation

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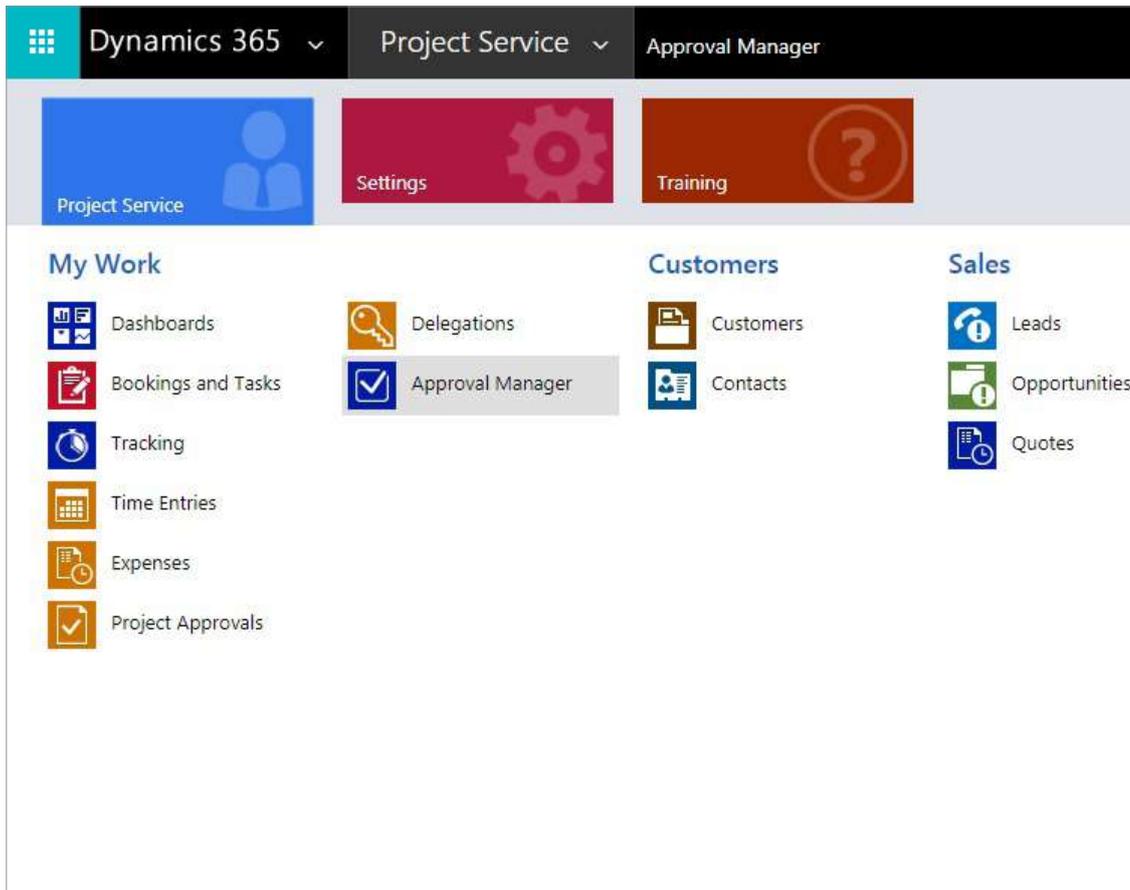


Approval Manager for Dynamics 365 for Project Service Automation

Approval Manager for Dynamics 365 for Project Service Automation extends the approval management functionality of Dynamics 365 for Project Service Automation. It allows project managers to check submitted time entries and expenses for accuracy, edit them if necessary, reject, or approve them. Approved time entries and expenses can then be used for invoicing.

Approve or Reject Time Entries

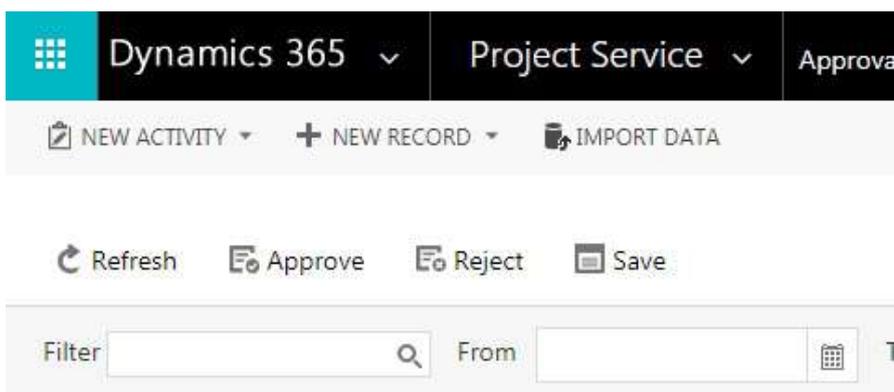
1. Go to **Project Service > Approval Manager**.



The screenshot shows the Dynamics 365 Project Service Approval Manager navigation pane. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Approval Manager'. Below this, there are three main sections: 'Project Service' (blue), 'Settings' (red), and 'Training' (orange). The 'My Work' section is expanded, showing a list of items: Dashboards, Bookings and Tasks, Tracking, Time Entries, Expenses, and Project Approvals. The 'Approval Manager' item is highlighted. Other sections include 'Customers' (Customers, Contacts) and 'Sales' (Leads, Opportunities, Quotes).

2. To display all time entries in the system, click **Refresh**.

To load only selected time entries, open the **Filter** look-up field by clicking the magnifying glass icon in that field. Then, add one or more projects, accounts, contacts, project tasks, bookable resources, or project task assignments, click **Select**, and finally **Add**.



The screenshot shows the Dynamics 365 Project Service Approval Manager interface. The top navigation bar includes 'Dynamics 365', 'Project Service', and 'Approval Manager'. Below this, there are three main sections: 'NEW ACTIVITY', 'NEW RECORD', and 'IMPORT DATA'. The 'Refresh' button is highlighted. Below the buttons, there is a 'Filter' field with a magnifying glass icon, a 'From' field with a calendar icon, and a '1' button.



Look Up Records

Look for:

Look in:

Search:

Name	Stage Name	Customer	Start Date	Estimate
CRM Default Implementation	Quote	MSG-Services	4/20/2017	
CRM Workshop	Plan	MSG-Services	4/24/2017	
<input checked="" type="checkbox"/> Development Work	Quote	MSG-Services	5/1/2017	
E Risk Management Plan	Plan	Novartis AG	6/30/2017	
Einführung neues Medikament Deliver		Tennison AG	6/28/2017	
...				

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Selected records: (0) Invert selection

Select Remove

Add Cancel

3. Click **Refresh**. Based on the selected view, date range and filter, records will be displayed in the main panel.

Time Entries		Expenses				
Date	Project	Project Task	Role	Type	Entry Status	
2/14/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Draft	
2/21/2017	Projekt Service Aut...	Kick Off Meeting	Project Manager	Work	Approved	
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/7/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved	
3/7/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/8/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved	
3/10/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved	
3/13/2017	Tech Parts Shop Fl...	Unit testing	Team Member	Work	Approved	
3/13/2017	Tech Parts Shop Fl...	Training manual	Team Member	Work	Approved	



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4. Use the project tree on the left-hand side to filter time entries by project, project task or project task assignment. To do so, expand the project tree and select the desired item in the structure.

Date	Project	Project Task	Role	Type	Entry Status
2/14/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Draft
2/21/2017	Projekt Service Aut...	Kick Off Meeting	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/6/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved
3/7/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/8/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/9/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Development	Project Manager	Work	Approved
3/10/2017	Projekt Service Aut...	Requirements Wor...	Project Manager	Work	Approved
3/13/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved
3/13/2017	Tech Parts Shop F...	Training manual	Team Member	Work	Approved
3/13/2017	Projekt Service Aut...	Documentation	Project Manager	Work	Approved
3/14/2017	Tech Parts Shop F...	System training	Team Member	Work	Approved
3/14/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved

5. To approve a time entry, select it by clicking the check column. You may select multiple records at once. Once you have selected all desired records, click **Approve**.

Date	Project	Project Task	Role	Type	Entry Status	
<input checked="" type="checkbox"/>	6/7/2017	IT-Governance	c development	Architect	Work	Submitted
<input checked="" type="checkbox"/>	4/26/2017	Fitting and Commi...	Electrical fitting	Project Manager	Work	Submitted
<input type="checkbox"/>	4/26/2017	Fitting and Commi...	Mechanical fitting	Project Manager	Work	Draft
<input type="checkbox"/>	4/25/2017	Tech Parts Shop F...	Unit testing	Team Member	Work	Approved
<input type="checkbox"/>	4/25/2017	Fitting and Commi...	Electrical fitting	Project Manager	Work	Draft
<input type="checkbox"/>	4/24/2017	Tech Parts Shop F...	Training manual	Team Member	Work	Approved
<input type="checkbox"/>	4/18/2017	Fitting and Commi...	Planning Phase	Project Manager	Work	Draft

6. In case a time entry was approved by mistake or should be edited by the respective employee, you may unapprove these records by selecting them and clicking **Reject**.

Contact

For questions, wishes or feedback, please contact us via support@proMX.net or the below details.

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